

## VP, Director of Intermediary Sales

### **About the Position**

Reporting to the Chief Client Officer, the VP, Director of Intermediary Sales is responsible for leading, coaching and mentoring the intermediary sales team including Regional Consultants (internal wholesalers) and Regional Directors (external wholesalers). They are responsible for the creation of goals and measurements, implementation of technology solutions, conducting compliance oversight, understanding and evaluating industry trends. The Director of Intermediary Sales identifies opportunities based on advanced understanding of capital markets for improving client interactions resulting in elevated sales interactions.

### **Essential Functions**

- Lead, develop, coach, and motivate direct and indirect reports.
- Develop a strong command of WIM's products and investment process.
- Design, implement and oversee sales practices and procedures to ensure consistency in messaging, use of technology, and compliance requirements.
- Improve team effectiveness and efficiency through the use of data and technology resources.
- Design, implement and oversee professional development programs to enhance the teams' ability to proactively market WIM's products, and build relationships with registered representatives.
- Collaborate with other areas of distribution (client portfolio managers, portfolio analytics, marketing) to develop effective training sessions/programs.
- Work with regional teams to develop territory business plans to grow sales, market share and increase visibility.
- Evaluate market data, statistics and trends and integrate data into sales activity and strategy.
- Analyze sales and activity data to identify strengths/weaknesses.
- Manage intermediary distribution sales budgets/expenses.
- Collaborate with marketing and business intelligence to develop/enhance tools, processes and resources.
- Other duties as assigned based on company needs.

### **Requirements**

- Bachelor's degree in business or related field, or equivalent education/experience
- Minimum 10 years of experience in financial products sales management
- Ability to build productive relationships; provide training and sales ideas
- Experience with CRM applications (e.g.; salesforce.com)
- Proven consultative sales acumen, presentation skills and investment knowledge
- Ability to balance multiple priorities and meet specific marketing/production objectives
- Motivated, self-starter
- Ability to work collaboratively and effectively
- Series 6 or 7, 63 and 24 licenses required

Please apply by submitting resume by e-mail at [careers@weitzinvestments.com](mailto:careers@weitzinvestments.com).

### **About Weitz Investment Management**

Founded by value investor Wally Weitz in 1983, Weitz Investment Management, Inc. is a boutique, employee-owned asset management firm headquartered in Omaha, Nebraska. Over the past three decades, Weitz has leveraged its research-driven approach to capitalize on opportunities that arise out of market inefficiencies. Decisions are backed by thorough research, logical strategies, extensive debate and our team's personal commitment to long-term results. The Weitz team builds and manages concentrated, high-conviction, actively managed portfolios. Through bottom-up, proprietary research that emphasizes fundamentals, we focus on creating positive results over the long term. We offer a variety of options for investors with different goals and preferences, including equity and fixed income investment strategies.

We offer all employees competitive compensation and benefits including medical, dental and vision coverage, as well as parental leave, paid time off, on-site gym access, and a very generous qualified profit sharing plan. Compensation includes salary and bonus and will be commensurate with experience.